DOCUMENT RESUME

ED 176 126 CE 022 822

AUTHOR Robbins, J. Nevin
TITLE ERIC Resource Management Workshops--Special Report on School System Standing Order Customers.
INSTITUTION ERIC Clearinghouse on Adult, Career, and Vocational Education, Columbus, Ohio.
SPONS AGENCY National Inst. of Education (DHEW), Washington, D.C.
PUB DATE Sep 79
CONTRACT 400-76-0122
NOTE 70p.; For a related document see CE 022 821

EDRS PRICE MF01/PC03 Plus Postage.
DESCRIPTORS Clearinghouses; Information Centers; Information Services; *Information Systems; Information Utilization; Management; Program Administration; Program Improvement; *School Systems; User Satisfaction (Information); *Use Studies; *Workshops
IDENTIFIERS *ERIC

ABSTRACT

This report summarizes descriptive information on school systems and school system-related organizations that maintain complete files of ERIC (Educational Resources Information Center) materials. The data reported were provided by participants in a series of regional workshops held throughout the United States on information management practices for organizations which have standing orders to receive most ERIC materials. The report is organized into three major sections. Part 1 discusses the administration, workshop structure, and analytical processes employed in conducting the project. Part 2 presents the results and findings of the workshops that relate specifically to school system standing order customers (SOCs). These findings are discussed in six sections: (1) the extent of participation by school system SOCs; (2) the ERIC-Related services provided by school system SOCs; (3) the availability of ERIC-related resources such as indexes and microfiche readers; (4) the extent to which ERIC resources are used at school system SOC locations; (5) the availability of existing library management data; and (6) the concerns and needs of SOCs. Finally, part 3 includes four appendices to provide specific details on the project and the school system SOCs. (For extensive statistics on all SOCs and verbal information from workshop participants, see ERIC companion document, CE 022 821.) (BM)

****
* Reproductions supplied by EDRS are the best that can be made *
* from the original document. *
****

ED176126

ERIC RESOURCE MANAGEMENT WORKSHOPS

Special Report on School System Standing Order Customers

J. Nevin Robbins

ERIC Clearinghouse on Adult, Career, and Vocational Education
The National Center for Research in Vocational Education
The Ohio State University
1960 Kenny Road Columbus, Ohio 43210
September, 1979

CE 022 822

U S DEPARTMENT OF HEALTH, EDUCATION & WELFARE
NATIONAL INSTITUTE OF EDUCATION

THIS DOCUMENT HAS BEEN REPRODUCED EXACTLY AS RECEIVED FROM THE PERSON OR ORGANIZATION ORIGINATING IT. POINTS OF VIEW OR OPINIONS STATED DO NOT NECESSARILY REPRESENT OFFICIAL NATIONAL INSTITUTE OF EDUCATION POSITION OR POLICY

THE NATIONAL CENTER MISSION STATEMENT

The National Center for Research in Vocational Education's mission is to increase the ability of diverse agencies, institutions, and organizations to solve educational problems relating to individual career planning, preparation, and progression. The National Center fulfills its mission by

- Generating knowledge through research
- Developing educational programs and products
- Evaluating individual program needs and outcomes
- Installing educational programs and products
- Operating information systems and services
- Conducting leadership development and training programs

FUNDING INFORMATION

Project Title:	ERIC Clearinghouse on Adult, Career, and Vocational Education
Special Project	Special Administration Project: Workshops on Management of ERIC Resources at Subscriber Libraries (Standing Order Customers)
Contract Number:	NIE-C-400-76-0122, Modification #1
Educational Act Under Which the Funds were Administered:	Vocational Educational Amendments of 1976, P.L. 94-482
Source of Contract:	Department of Health, Education, and Welfare National Institute of Education Washington, D.C.
Contractor:	The National Center for Research in Vocational Education The Ohio State University Columbus, Ohio
Project Director:	Marla Peterson
Special Project Manager:	J. Nevin Robbins
Disclaimer:	This publication was prepared pursuant to a contract with the National Institute of Education, U.S. Department of Health, Education, and Welfare. Contractors undertaking such projects under Government sponsorship are encouraged to express their judgement freely in professional and technical matters. Points of view or opinions do not, therefore, necessarily represent official National Institute of Education position or policy.
Discrimination Prohibited:	Title VI of the Civil Rights Act of 1964 states: "No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance." Title IX of the Education Amendments of 1972 states: "No person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal assistance." The ERIC Clearinghouse Project, like every program or activity receiving financial assistance from the U.S. Department of Health, Education, and Welfare, must comply with these laws.

ABSTRACT

This report summarizes descriptive information on school systems and school system-related organizations that maintain complete files of ERIC (Educational Resources Information Center) materials. The data reported were provided by participants in a series of regional workshops held throughout the United States on information management practices for organizations which have standing orders to receive most ERIC materials.

The report is organized into three major sections. Part one discusses the administration of the special project by the ERIC Clearinghouse on Adult, Career, and Vocational Education. First the background for the initiation of the project and the resulting structure of the workshops are described. Then the administrative and analytical processes are discussed. Part two presents the results and finding of the workshop project that relate specifically to school system standing order customers (SOCs). These findings are discussed in six sections: the extent of participation by school system SOCs; the ERIC-related services provided by school system SOCs; the availability of ERIC-related resources such as indexes and microfiche readers; the extent to which ERIC resources are used at school system SOC locations; the availability of existing library management data; and the concerns and needs of SOCs. Finally, part three includes four appendices to provide specific details on the project and the school system SOCs. (For extensive statistics on all SOCs and verbal information from all workshop participants, the reader is referred to a companion document, ERIC Resource Management Workshops Final Report.)

TABLE OF CONTENTS

ABSTRACT iii

LIST OF TABLES v

LIST OF FIGURES vii

FOREWORD viii

INTRODUCTION 1

PART I: PROJECT ADMINISTRATION 5

A. Workshop Development and Implementation 6

B. Project Administration 12

PART II: PROJECT RESULTS AND FINDINGS 19

A. Participation At Workshops 21

B. Provision of ERIC-related Services 27

C. Availability of ERIC-Related Resources 30

D. Use of ERIC Resources 33

E. Availability of Library Management Data 40

F. Concerns of Workshop Participants 43

PART III: APPENDICES 47

Appendix A - Workshop Guide 48

Appendix B - ERIC Microfiche Collections Held by School Systems in the United States 53

Appendix C - Types of Library Management Data Collected and Willingness to Share Data by School System Standing Order Customers (SOCs). 56

Appendix D - ERIC-Related Staff Training Needs Identified by School System Standing Order Customers (SOCs) 57

LIST OF TABLES

TABLE		PAGE
1	Types of School System Organizations Represented and Extent of School System Participation by ERIC Standing Order Customers (SOCs)	23
2	Participation of School System Standing Order Customers (SOCs) in the 1978-79 ERIC Management Workshops	26
3	Types of ERIC-Related Services Provided by ERIC Standing Order Customers (SOCs)	27
4	Participation per Year in User Training and Orientation Activities Conducted by School System ERIC Standing Order Customers (SOCs)	29
5	Amount of Resource Materials and Equipment Available at ERIC Standing Order Customer (SOC) Locations	30
6	Indicators of ERIC Usage on an Annual Basis at School System ERIC Standing Order Customer (SOC) Locations	34
7	Persons Using ERIC Microfiche and Printed Tools During Typical Year at School System ERIC Standing Order Customer (SOC) Locations	35
8	Estimated Primary Clientele Reasons for Using ERIC Resources by School System ERIC Standing Order Customers (SOCs)	36
9	Computer and Manual Searches of ERIC Data Base by School System ERIC Standing Order Customers (SOCs)	37
10	Annual Use of ERIC Microfiche Titles at ERIC Standing Order Customer (SOC) Locations	38
11	Specific Types of Annual Use of ERIC Microfiche (MF) Titles at ERIC Standing Order Customer (SOC) Locations	39

-continued-

List of Tables (concluded)

TABLES		PAGE
12	Collection of Library Management Data by School System ERIC Standing Order Customers (SOCs)	41

LIST OF FIGURES

FIGURE		PAGE
1	Schedule of ERIC Management Workshops	8
2	Agenda Topics for Regional ERIC Workshops	10
3	Outline of Information Sought in Workshop Guide	17
4	Location of ERIC Management Workshops and School System Participants	25

FOREWORD

Since its beginning thirteen years ago, ERIC (Educational Resources Information Center) has developed into one of the largest and most sophisticated information dissemination systems in this country. ERIC provides information and documentation services on educational materials and practices through clearinghouses, central facilities, and collections of microfiche copies of primarily unpublished reports and other printed materials. Over 700 ERIC microfiche collections are maintained in 22 countries to make ERIC materials available to the public.

The management of ERIC resources by each organization maintaining microfiche collections is often a complex task due to the extensiveness and evolving nature of the ERIC resources: microfiche collection, indexes, computerized data base, etc. As a service to these organizations, the National Institute of Education (which sponsors the ERIC system) provided funding for a series of workshops on the management of ERIC resources. Twenty-six regional workshops were conducted from November, 1978 through July, 1979 by the staffs of all 16 ERIC clearinghouses.

The National Center for Research in Vocational Education is pleased that one of its major projects, the ERIC Clearinghouse on Adult, Career, and Vocational Education, served as the administrative agent for the implementation of the ERIC Management Workshops project. The project resulted in the participation of over 80% of the organizations maintaining ERIC microfiche collections in the United States. It is felt that the representatives of those organizations benefited greatly from the workshops. Further, the ERIC system should find the evaluative information provided by those organizations valuable as ERIC seeks to improve its services.

This special report characterizes many aspects of school systems that maintain ERIC microfiche collections in the United States. Information is presented that was obtained from school system representatives during the ERIC Management Workshops. This report and its companion document, the final report on the workshop project, provide the reader with an opportunity for an in-depth examination of the circumstances and needs of the many school systems maintaining extensive ERIC materials.

The concerted effort of a significant number of dedicated people was required to conduct the series of workshops. Appreciation is expressed to the staffs of the ERIC clearinghouses and

Central ERIC who contributed valuable time and resources to implementing the workshops. Their efforts made the entire workshop project happen. Special recognition is extended to the special project staff for their dedication in completing the project and this report: J. Nevin Robbins, project manager; Celia G. Wright, clerical specialist; Elizabeth H. Cheney, data analyst; and Cindy King, accounting clerk. Appreciation must also be expressed to three persons for their critical review of this report prior to its final revision and publication: JoAnn B. Brooks of Vocational Education Information Services, Indiana University; Glenn S. Gritzmacher of Milner Library, Illinois State University; and Marilyn S. Shorr of the ERIC Clearinghouse on Higher Education, George Washington University.

Robert E. Taylor
Executive Director
National Center for Research
in Vocational Education

INTRODUCTION

This report summarizes descriptive information on school systems and school system related organizations that maintain complete files of ERIC (Educational Resources Information Center) materials, (e.g., indexes, microfiche collection, and computer terminals). This information was collected during a special project conducted to enhance the information management capability of organizations that maintain complete ERIC files. The project was sponsored by the National Institute of Education (NIE), coordinated by NIE's Central ERIC staff, and administered by the ERIC Clearinghouse on Adult, Career, and Vocational Education.

ERIC is a national information system which obtains and makes available hard-to-find, often unpublished information in all areas of education. The system uses a nationwide network of sixteen clearinghouses to acquire, select, annotate, and index current printed materials in many educational areas. Additionally, centralized ERIC facilities handle the reproduction and distribution of documents to individuals and libraries throughout the world.

The project provided a series of regional workshops throughout the United States on management practices for organizations which have standing orders to receive most ERIC

materials. Invitations were extended to 677 such "Standing Order Customers" (SOCs) to attend meetings in their respective regions. The response of the SOCs (also known as ERIC subscriber libraries or microfiche collections) was tremendous. Twenty-six workshops were held from November 1978, through August, 1979, and 82% (545) of the SOCs in the United States and its territories attended. Additionally, eight SOCs from Canada, one SOC from Jamaica, and one SOC from England were able to attend the workshops.

Among the participants at the series of workshops were 37 representatives of ERIC SOCs providing direct service to elementary and secondary schools in the United States. The participating school system SOCs comprised 61% of the 60 U.S. school system SOCs. The school system SOCs included individual schools and school districts as well as information centers and intermediate service agencies that provided service to schools and school districts.

According to participant feedback from evaluations and letters, the workshops were valuable learning experiences. Participants learned many new aspects of using and managing ERIC resources and developed professional relationships with each other and ERIC staff. ERIC staff also learned a great deal from the experience. Most participants provided ERIC with considerable information about the nature of their organizations and their uses of ERIC. That information provided ERIC with the

opportunity to evaluate the quality of its materials and services including the means by which the materials are made available to the public through the SOCs.

This report is organized into three major sections. In Part I, the administration of the special project by the ERIC Clearinghouse on Adult, Career, and Vocational Education is discussed. The clearinghouse had system responsibilities for administering the workshop expenses and for collecting and analyzing the evaluative information obtained from workshop participants.

In Part II, project results and findings in relation to elementary and secondary school systems in the United States are summarized and discussed. Copies of workshop materials were used as sources of descriptive and evaluative information on SOC organizations and practices. Both data and verbal information are summarized in the sections of Part II.

It is important that the reader be aware of a major limitation to the data presented in Part II. All of the information and opinions summarized in Part II were based solely upon the recollections and ideas of the workshop participants. Since a survey was not used to obtain the information, its accuracy was dependent upon the ability of the workshop participants to know about and recall many characteristics of their respective organizations and clientele. Many participants had made concerted efforts to talk with all of their staff who work with ERIC materials prior to the workshop in order to answer questions

about their operation. Other participants did not do that. The resulting information and subsequent interpretations should be treated as reasonable estimates only, not precise facts.

Finally, in Part IV, four appendices are included to provide specific details on the project and the school system SOCs.

This special report on school system SOCs is a companion document to the Final Report on ERIC Management Workshops issued simultaneously with this report by the ERIC Clearinghouse on Adult, Career, and Vocational Education. The final project report includes analyses of information about all types of SOCs and extensive appendices of data and SOC comments. The reader of this report will be referred to specific sections of the final report for in depth examinations of issues concerning all SOCs. Such references are especially valuable because the reader can then learn the viewpoints of the SOCs through their own comments.

PART I.

PROJECT ADMINISTRATION

The basic purpose of the special project awarded to the ERIC Clearinghouse on Adult, Career, and Vocational Education (ERIC/CE) was to provide the administrative support for the 1978-1979 series of workshops for managers of ERIC microfiche collections. The major part of the support was financial; ERIC/CE was responsible for coordinating and paying all appropriate workshop related expenses. The remainder of the support was analytical; ERIC/CE was responsible for the collection and synthesis of evaluative data on workshops and workshop participants.

This part of the special report on school system SOCs addresses the administration and operation of the project on ERIC Management Workshops. In Section A, the background for the initiation of the project and the resulting structure of the workshops is discussed. In Section B, the administrative and analytical processes of the project are described.

A. Workshop Development and Implementation

The ERIC system has always sought to respond to the needs of the organizations or libraries which have standing orders to receive all microfiche copies of documents selected and reproduced by ERIC. In recent years, ERIC workshops were conducted to introduce Standing Order Customer staff to the usefulness of ERIC resources. The latest series of workshops emphasized the management of ERIC materials and other related resources.

Project Background and Initiation

Initial planning began in 1978 as representatives of Central ERIC at the National Institute of Education (NIE) met with representatives of several ERIC clearinghouses to establish the direction of the then forthcoming series of workshops. Two factors strongly influenced the decisions of the planning committee to address SOC management rather than staff orientation needs. First, many of the persons responsible for ERIC microfiche collections had already participated in general orientations on ERIC. Second, funding for the forthcoming workshops by the NIE Evaluation Division was accompanied by expectations that at least half of the workshop effort would be addressed to evaluation concerns.

The planning committee then chose to direct the workshop activities toward the managers of ERIC microfiche collections in order that workshop participants would be capable of representing the full scope of ERIC resources as the workshops addressed management issues and sought evaluative information. In order that both the service provided by the workshops and the information gathered at the workshops be consistent across all workshops, it was further decided that a standard agenda would be implemented.

Regional workshops were then held around the country on a rotating basis by the staff of all ERIC clearinghouses. The clearinghouses were assigned the responsibility of implementing the series of ERIC management workshops. The ERIC staffs coordinated their activities to provide generally equivalent workshop services to the ERIC subscriber libraries. Participation was enthusiastic. The workshops provided opportunities for service by ERIC staff to these Standing Order Customers and for interaction among SOC staff and ERIC staff.

Twenty-six workshops were conducted from November, 1978 through July, 1979--twenty-five in the United States and one in Canada. The schedule of all ERIC Management Workshop meetings is presented in Figure 1.

Workshop Number	Date	City/State	Facilities
1	November 7,1978	Alexandria,VA	Ramada Inn
2	December 6-7,1978	St. Paul,MN	Capp Tower Motel
3	December 7-8, 1978	Ann Arbor,MI	University of Michigan
4	February 12-13,1979	Jacksonville,FL	Skycenter Inn
5	February 15-16,1979	St. Louis,MO	Chase Park Hotel
6	February 16, 1979	Columbus,OH	ERIC/SMEAC
7	February 23, 1979	Indianapolis,IN	Indiana State Library
8	March 12,1979	Boulder, CO	ERIC/CHESS
9	March 14,1979	New York, NY	Columbia University
10	March 29-30,1979	New Orleans,LA	Howard Johnson
11	April 2-3,1979	Philadelphia,PA	Holiday Inn Airport
12	April 4-5,1979	Raleigh,NC	Velvet Cloak Inn
13	April 5-6,1979	Oklahoma City,OK	Sheraton Airport
14	April 19-20,1979	Portland, OR	Mallory Hotel
15	April 24, 1979	San Francisco,CA	Royal Inn
16	May 4,1979	Charleston,WV	Appalachia Educational Laboratory
17	May 7,1979	Boston,MA	Boston University
18	May 8,1979	Phoenix,AR	State Department of Education
19	May 15-16,1979	Syracuse, NY	Syracuse University
20	May 14,1979	San Antonio,TX	El Tropicano Hotel
21	May 16,1979	Dallas, TX	Holiday Inn South
22	May 21-22,1979	Los Angeles,CA	Holiday Inn
23	May 30-31,1979	Toronto, CAN	Ontario Institute for Studies in Education
24	July 18-19,1979	Champaign, IL	Ramada Inn
25	July 26-27,1979	New York,NY	Holiday Inn-LaGuardia
26	July 26-27,1979	Atlanta,Ga	Peachtree Plaza

Figure 1. Schedule of ERIC management workshops.

Workshop Structure

Two major goals were established for the series of workshops. The workshops were (1) to provide a medium for service to ERIC Standing Order Customers and (2) to provide a medium for interaction between the Standing Order Customers and the ERIC system.

As a medium for service, the workshops generally followed a standard agenda which provided participants with information about ERIC resources, technology, and developments. As a medium for interaction, the workshops brought SOC representatives in direct contact with clearinghouse representatives having responsibilities for future service to the SOCs. Further, the workshops facilitated the sharing of considerable information by SOCs about their use of ERIC materials. This information not only served to focus workshop activities on the practical situation of the SOCs but also to identify SOC-related problems or needs which ERIC should address in the future.

The series of workshops was structured to use brief meetings with a common agenda to serve SOC staff on a regional basis throughout the nine month schedule. Clearinghouse staff were expected to cover the same basic topics in each workshop but were free to present the subjects any way they wished.

The final agenda was established for the workshop series after the first meeting in Alexandria, Virginia and consisted of the six topics listed in Figure 2. The first topic, "ERIC Update," was a review of current activities throughout the ERIC system. The remaining five topics addressed the provision and management of ERIC resources at subscriber libraries.

Each meeting was scheduled to last approximately one day. Some meetings were held from noon one day until noon the next; other meetings were held on one day from morning through

1. ERIC Update
2. Overview of ERIC Components and Management of Printed Tools
3. Management of Microfiche Collection
4. Management of Computer and Manual Searching
5. Training and Orientation of Users
6. Library Management Reporting

Figure 2. Agenda topics for regional ERIC workshops.

afternoon. The particular type of meeting was determined by workshop location and traveler accessibility.

The methods of conducting the workshops were left to the discretion of the coordinators of each meeting. Some coordinators emphasized the presentation of information while others emphasized group processes such as paired interviews.

Regardless of how the meetings were conducted, all workshops served several common functions. First, all workshops served as a forum for both ERIC staff and SOC representatives to express their ideas and concerns. Second, all workshops provided a means for stimulating interaction among the participants and between participants and ERIC staff. Finally, all workshops helped bring SOC and ERIC needs into the open. In one sense, the workshops served as a means of training and orientation. In a much broader sense, however, the workshops served as means of communication between ERIC and its constituency.

During each workshop the participants were asked to characterize their coordination of ERIC resources in order that their management circumstances and problems could be discussed and compared. A "Workshop Guide" provided a consistent format for the description of each management situation. The Workshop Guide posed several descriptive questions under each topic of the agenda. As the SOC representatives described their organizations on the guide, they shared a common focus for discussion. Participants were also asked to evaluate the relevancy and usefulness of the workshops. Information obtained from the guides and the evaluation forms served as the basis for the findings described in Part II of this report.

B. Project Administration

The overall ERIC project to provide workshops for the management staff of ERIC Standing Order Customers required extensive involvement on the part of all ERIC clearinghouses. The organization which implemented the workshops was essentially a confederation of cooperating clearinghouses, each having particular responsibilities and following the guidelines established by Central ERIC. All clearinghouses had responsibility for the planning and implementation of their respective workshops.

The ERIC Clearinghouse on Adult, Career, and Vocational Education (ERIC/CE) was assigned the responsibility of providing administrative and analytical support to all clearinghouses and workshop participants. ERIC/CE was funded to pay the expenses of conducting the workshops, including the costs of travel, meals, lodging, meeting rooms, etc. Additionally, ERIC/CE was asked to collect and analyze evaluative information on organizations participating in the workshops.

The five major tasks of the special project were to: (a) pay the travel expenses of all designated workshop participants and ERIC staff, (b) pay the conference expenses for facilities and equipment, (c) develop and provide the forms for the collection of information on workshop participants and on their

evaluation of the workshops, (d) analyze the findings of workshop activities, and (e) prepare reports on project activities and results.

To accomplish those tasks, a small group of part-time staff was formed at ERIC/CE. The project manager was Dr. Nevin Robbins, who also served as the clearinghouse's assistant director for adult education. The clerical specialist for the project was Ms. Celia Wright, who handled primarily the preparation and processing of travel and workshop materials. Ms. Cindy King served as the accounting clerk for processing travel and workshop expenses. Additionally, Ms. Elizabeth Cheney served as data analyst in the latter phase of the project. The project also employed several persons on a temporary basis to assist with the preparation of reports.

While the ERIC/CE staff provided many support services as specified in the special project contract, many additional staff members (59) at all ERIC clearinghouses contributed considerable amounts of time and energy to the project at no cost to the contract. All of those ERIC staff people comprised the actual special project organization, even though most worked in clearinghouses different from the contract holding clearinghouse (ERIC/CE).

Workshop Expenses

The contract for the administration of the series of workshops specified that ERIC/CE would pay all expenses related to the performance of the workshops. These expenses included the

travel expenses of workshop staff and participants. Each Standing Order Customer had an opportunity to send one representative at ERIC expense to a workshop. Visitors were welcome but had to pay their own expenses. The contract also paid for normal conference expenses, such as meeting rooms, audio-visual equipment rental, etc.

Transportation expenses were minimized through the provision of regional workshops. Each SOC was invited to attend the nearest workshop. The selection of reasonably priced meeting facilities and accommodations also helped minimize expenses.

Two approaches were taken for the payment of project expenses. First, a reimbursement procedure was used for all travel-related expenses for both SOC representatives and ERIC staff. Second, a contractual procedure was used often for conference services, such as rentals. In order to reduce each participant's out-of-pocket expenses prior to reimbursement, contracts were also issued whenever possible to allow direct payment from ERIC/CE, often for group meals and hotel accommodations.

All travel expense reimbursements were made within the policies and guidelines of The Ohio State University, the official fiscal agent for the project. Each participant was provided with a "Traveler's Packet" of information and forms which supplied all the necessary materials for travel expense reimbursement.

Information Collection and Analysis

In response to the needs of ERIC and the National Institute of Education for evaluative information on workshops and workshop participants, the special project obtained considerable information and feedback from the Standing Order Customer representatives. The information proved to be useful in planning successive workshops and for providing insight into SOC situations and needs.

Three types of information were recorded for analysis and reporting: (1) descriptive information for developing profiles of the several types of ERIC Standing Order Customers, (2) subjective information for characterizing the opinions and needs of Standing Order Customers in relation to ERIC resources and services, and (3) workshop evaluations for gauging the effectiveness of the workshops.

This information was collected by two means. First, a form entitled "Workshop Guide" was used in conjunction with the agenda topics to characterize the SOCs in attendance. Second, an anonymous "Participant Evaluation of Workshop" form was used to solicit SOC opinions on the relevance and usefulness of workshop presentations and the overall strengths and weaknesses of each workshop.

The Workshop Guides were developed to serve as workshop aids and a means of promoting the comparability of information about diverse types of Standing Order Customers. The content of

the Workshop Guide was determined by Central ERIC staff and members of the workshop planning committee immediately after the first (model) workshop was held. Multiple choice and open-ended opportunities were provided for workshop participants to describe their organizations in terms of ERIC-related materials and activities. Workshop Guide questions were associated with each agenda topic to help focus group discussion upon management processes and problems. Participants generally completed sections of the Workshop Guide as the particular topics were discussed. An outline of Workshop guide information is shown in Figure 3, and a copy of the Workshop Guide itself is contained in Appendix A.

The analysis of all information was subject to several limitations which should be considered prior to any interpretation of the findings. First, all empirical data was based solely upon the recollections of individual SOC representatives. A survey was not used, and participant recall or awareness of certain activities or materials may have been minimal. In any case, participants were asked to provide reasonable estimates whenever possible. The data presented in this report should be accepted in that light. Second, not all representatives completed all questions or even a Workshop Guide. Items for which data was missing were not used in the tabulations. Third, some questions may have been misinterpreted as addressing library-wide services rather than ERIC-related services. Such questions are identified in the section which follows.

1. General Information

   - Name and address of SOC representative
   - Type of organization represented
   - Types of ERIC-related services provided by SOC
   - Critical questions for workshop leaders
   - Suggestions for improving ERIC

2. Agenda Topic: Review of ERIC Components and Management of Printed Tools

   - Types of printed tools available to users
   - Location of ERIC components

3. Agenda Topic: Management of Microfiche Collection

   - Types and number of microfiche readers
   - Use, circulation, and reproduction of microfiche

4. Agenda Topic: Management of Computer and Manual Searching

   - Type and number of searches conducted
   - Frequently used data bases

5. Agenda Topic: Training and Orientation of Users

   - Types of ERIC users
   - Reasons for using ERIC
   - Training persons to use ERIC
   - Instructional or orientation materials developed locally
   - Need for further training of library staff

6. Agenda Topic: Library Management Reporting

   - Types of data normally collected
   - Willingness to share management data
   - Contact person for data

Figure 3. Outline of information sought in Workshop Guide.

On the whole, the ERIC Management Workshop project obtained considerable information on the manner in which ERIC Standing Order Customers maintain and use ERIC resources. The information provides ERIC with an opportunity for a broad scale review of how one major group of organizations uses and reacts to its services. This special report provides ERIC with an opportunity for a close examination of one very important user group: the school system Standing Order Customer.

PART II

PROJECT RESULTS AND FINDINGS

The 1978-79 ERIC Resource Management Workshop series had two principal outcomes. First, service was provided to 82% of ERIC's Standing Order Customers in the United States and its territories. This included service to 60% of U.S. school system SOCs. Second, ERIC acquired valuable information on the characteristics and needs of those SOCs. Because of the information gathered, future ERIC service to the SOCs may be developed more knowledgeably.

This part of the special report describes the results and findings of the workshop project that relate specifically to school system SOCs. The ERIC Clearinghouse on Adult, Career, and Vocational Education had the responsibility of analyzing all descriptive and evaluative information obtained through the series of workshops. The findings of this project are based upon information provided by almost all (91%) of the participants at U.S. workshops. The findings about school systems are based upon the information provided by 22 workshop participants that identified themselves as specifically representing school system SOCs.

For detailed statistics on all SOCs and extensive verbal information (e.g., comments, needs, and recommendations) from all workshop participants, the reader is referred to a companion document, ERIC Resource Management Workshops Final Report. Several

appendices in that report present many representative quotations which clearly express the SOC viewpoint.

Six sections comprise this part of the special report. In section A, the extent of participation by school system SOCs is discussed. In section B, the ERIC-related services provided by school system SOCs are identified. The availability of ERIC-related resources such as indexes and microfiche readers is described in section C. The extent to which ERIC resources are used at school system SOCs is characterized in section D. In section E, the availability of existing library management data is discussed. Finally, many of the concerns and needs of SOCs are outlined in section F.

A. Participation at Workshops

ERIC Standing Order Customers responded enthusiastically to the 1978-79 series of ERIC Management Workshops. Over a nine month period, 82% (555) of the 677 invited SOCs participated in the workshops. Among those participants were the representatives of 35 school system SOCs (60% of the 58 U.S. school system SOCs).

Twenty-two workshop participants identified themselves as school system SOCs. There were 13 additional school system SOCs who classified themselves as representing other types of organizations: information centers, state agencies, and college libraries. The analysis of school system SOC characteristics in both this special report and the final project report on the workshops was based upon information from the 22 self-identified school system SOCs. The figures used in determining the rate of participation and the estimates of annual ERIC usage by school systems were based on the total number of school system SOCs in the United States (58).

For the purposes of this special report, school system Standing Order Customers are defined as those organizations that function as, manage, or provide direct service to elementary or secondary schools or school districts, with the exclusion of state departments of education. Four types of organizations were identified that are considered school system SOCs in this report.

Their operational definitions follow below.

> School. A single elementary or secondary level school.
>
> School District or School Board. Administrative unit responsible for services to a set of local schools.
>
> Intermediate Agency. Organization serving multiple school districts but not an entire state. Coordinates or provides administrative services on local or district levels.
>
> School System Information Center. Organization with multi-district or statewide responsibilities for dissemination of information or provision of services, but not for the administrative coordination of school systems.

Not all types of organizations were easily differentiated in practice. Both intermediate agencies and information centers, for example, provided information services to school systems but could be distinguished according to whether they fulfilled administrative roles. State education departments having regulatory and financial responsibilities for school systems were listed separately under the organization classification, "state agency."

The number of school system SOCs classified into the four categories by the special project staff is presented in Table 1. The type of organization having the most ERIC microfiche collections is the school district or school board office (30 of the 58 school system SOCs).

TABLE 1

TYPES OF SCHOOL SYSTEM ORGANIZATIONS REPRESENTED AND EXTENT OF SCHOOL SYSTEM PARTICIPATION BY ERIC STANDING ORDER CUSTOMERS (SOCs)

Type of School System SOC	No. of Participating SOCs	No. of Non-Participating SOCs	Total Number SOCs
Schools		1	1 (2%)
School District/ School Board	20	10	30 (52%)
Intermediate Agency	6	6	12 (21%)
Information Center	9	6	15 (26%)
Total	35 (60%)	23 (40%)	58(100%)

A list of the organizations that project staff identified as school system SOCs is provided in Appendix B. The list was developed from the 1978 Directory of ERIC Microfiche Collections. Several characteristics of the list should be noted. An organizational identification number assigned to every SOC for the workshop series is shown beside each organizational name. The first two digits of the identification number represent the state and the second two digits represent the number of the organization listed under that state's name. The listing of new SOCs follows the last original directory listing. Asterisks beside identification numbers indicate participation in the 1978-79 ERIC Management Workshops. The letter in parentheses after the organization name represent the type of organizational classification assigned

to the SOC (S = School; SD = School District; IA = Intermediate Agency; and IC = Information Center).

The number of participating school system SOCs in each state is indicated on a U.S. Map in Figure 4. The map also identifies the location of the 26 workshops that were conducted during the 1978-79 period. The numbers of participating and non-participating school system SOCs are presented in Table 2. School system SOCs were identified in 17 states and in the District of Columbia. The two states with the largest proportions of school system SOCs provide the most extensive regionalized services to school districts--New York with ERIC Microfiche collections at 8 Boards of Cooperative Educational Services (BOCES) and Texas with ERIC microfiche collections at 6 regional Education Service Centers.

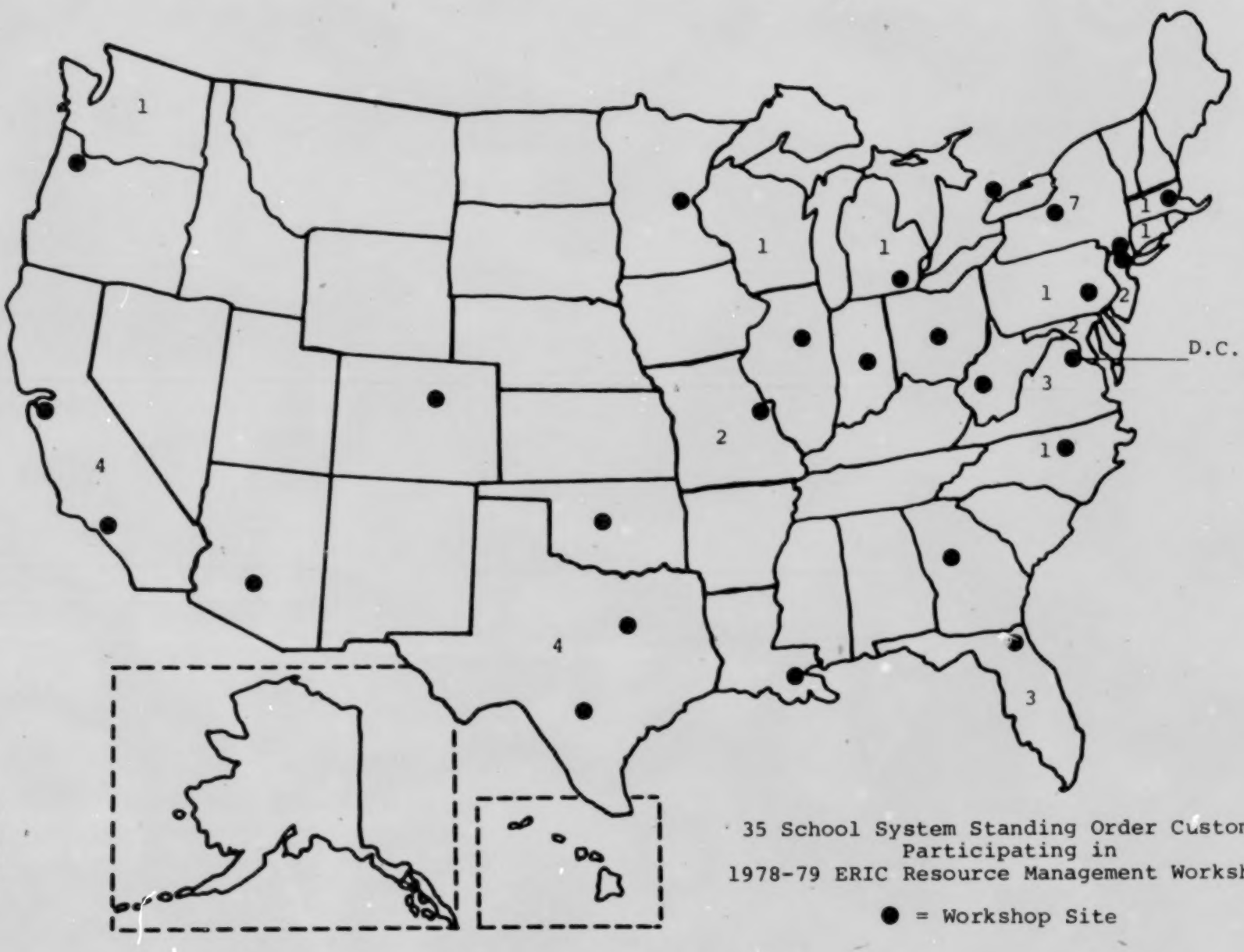

Figure 4. Location of ERIC Resources Management Workshops and School System Participants

TABLE 2

PARTICIPATION OF SCHOOL SYSTEM STANDING ORDER CUSTOMERS (SOCs)
AT 1978-79 ERIC RESOURCES MANAGEMENT WORKSHOPS

State	Number of Participating SOCs	Number of Non-Participating SOCs	Total Number SOCs
California	4	0	4
Colorado	0	1	1
Connecticut	1	1	2
District of Columbia	1	0	1
Florida	3	1	4
Massachusetts	1	2	3
Maryland	2	0	2
Michigan	1	2	3
Missouri	2	1	3
New Jersey	2	1	3
New York	7	3	10
North Carolina	1	1	2
Pennsylvania	1	0	1
South Carolina	0	2	2
Texas	4	5	9
Virginia	3	0	3
Washington	1	3	4
Wisconsin	1	0	1
All States	35	23	58

B. Provision of ERIC-Related Services

A variety of services related to ERIC resources was provided by ERIC Standing Order Customers. Virtually all SOCs provided reference assistance, made paper copies from microfiche, and provided orientations to ERIC. A majority of SOCs circulated microfiche and conducted manual and computer searches of ERIC. Proportionally, school system SOCs provided generally the same services as did all SOCs in the United States. Table 3 compares all responding SOCs with the responding school system SOCs in terms of services provided.

TABLE 3

TYPES OF ERIC-RELATED SERVICES PROVIDED BY ERIC STANDING ORDER CUSTOMERS (SOCs)

Type of Service	All SOCs (N=495)		School System SOCs (n=22)	
	no.	%N	no.	%n
User Assistance Services				
Reference Assistance	484	98	21	95
Orientation to ERIC	448	91	16	73
Microfiche Services				
Circulation of Microfiche	290	59	15	68
Circulation of Microfiche Readers	77	16	4	18

-continued-

Table 3 concluded

Type of Service	All SOCs (N=495) no.	%N	School System SOCs (n=22) no.	%n
Data Base Search Services				
Manual Searching	402	81	20	91
Computer Searching	302	61	10	45
Search Referral	183	37	8	36
Reproduction Services				
Duplication of Microfiche	213	43	8	36
Paper Copies from Microfiche	473	96	22	100
Copy Machines	114	23	4	18
Order Copies from EDRS	157	32	13	59

Over half the SOCs that completed Workshop Guides specified that they had developed at least one type of instructional or orientation material. Similarly, 13 of the 22 public school SOCs were found to have produced materials. The types of materials and the number of school system SOCs developing them are shown below.

Printed Handouts	5 Public School SOCs
Audio/Visual Materials	3 Public School SOCs
Self-Instructional Units	1 Public School SOC
Other Types of Materials	2 Public School SOCs

The training and orientation of ERIC users was reported by 13 of the 22 school system SOCs completing Workshop Guides. Altogether, the 13 school system SOCs trained over 5,300 users in a typical year. Nearly all training or

orientation took place as individual assistance or in general library orientation. The number of users reported by the SOCs is shown in Table 4. Because of some ambiguity on the Workshop Guide question, the users indicated in the table may be general library patrons as well as ERIC users.

TABLE 4

PARTICIPATION PER YEAR IN USER TRAINING AND ORIENTATION ACTIVITIES CONDUCTED BY SCHOOL SYSTEM ERIC STANDING ORDER CUSTOMERS (SOCs)

Type of Training or Orientation	Total Participation (at 13 SOCs)	Average Participation at School System SOCs		
		Mean	Median	Range
Individual Assistance on Request	2,430	186.9	50.0	0-1,100
General Orientations to Library Services	2,310	177.7	4.3	0-1,200
Information Science Class Presentations	150	11.5	6.2	0-150
Other Class Presentations	462	35.5	0.3	0-450
Other Means of Training or Orientation	30	2.3	0.9	0-20
All Training or Orientation Activities	5,382	414.1	219.8	0-2,900

C. Availability of ERIC-Related Resources

ERIC Standing Order Customers usually provided their constituency with several resources in addition to the microfiche collection. Frequently mentioned additional resources include indexes of several types, the Thesaurus of ERIC Descriptors, and equipment for reading or copying microfiche. School system SOCs provided almost the same amount of ERIC-related resources as all SOCs in general. Table 5 compares the number of resources available at the 18 responding school system SOCs with the resources available at all responding SOCs (458 for printed tools, 465 for microfiche readers).

TABLE 5

AMOUNT OF RESOURCE MATERIALS AND EQUIPMENT AVAILABLE AT ERIC STANDING ORDER CUSTOMER (SOC) LOCATIONS

Type of Resources	All SOCs			School System SOCs		
	Mean	Mode	Range	Mean	Mode	Range
Printed Tools						
Subscriptions to Resources in Education-monthly	1.4	1	0-34	1.0	1	1-1
Subscriptions to Resources in Education-semiannually	1.2	1	0-30	0.9	1	0-1
Subscriptions to Current Index to Journals in Education-monthly	1.0	1	0-10	0.7	1	0-1
Subscriptions to Current Index to Journals in Education-semiannually	1.0	1	0-10	1.1	1	0-6

-continued-

Table 5 (concluded)

Type of Resources	All SOCs Mean	All SOCs Mode	All SOCs Range	School System SOCs Mean	School System SOCs Mode	School System SOCs Range
Printed Tools (Continued)						
Copies of Cumulative Title Index	0.4	0	0-10	1.1	0	0-10
Copies of Institutional Source Index	0.3	0	0-37	0.3	0	0-2
Copies of ERIC Thesaurus	2.6	1	0-30	2.4	1	0-7
Microfiche Readers						
Reader/Printer	1.8	1	0-30	1.3	1	1-2
Reader only, stationary	5.5	0	0-135	1.4	0	0-4
Reader only, portable	3.0	0	0-100	2.9	0	0-8
All types of readers	10.3	9	1-180	5.7	5	1-12

One ERIC-related resource is the computer search service. It was mentioned earlier that ten of the 22 school system SOCs conducted computer searches of the ERIC data base. As an additional resources to users, four of those ten school system SOCs also conduct computer searches of non-ERIC data bases. Two search Psychological Abstracts, two search Exceptional Child Education Resources (ECER), one searches Social SciSearch, one searches Sociological Abstracts, and two search other data bases. These four school system SOCs conduct searches of about half of the data bases searched by universities and other types of SOCs. This is understandably so, for these other data bases are not particularly educational practice oriented: Agricola, ABI/INFORM, Comprehensive Dissertation Abstracts, and several life science data bases.

SOC representatives at the workshops were asked to characterize where their microfiche collection and related ERIC components were located in their facilities. Less than half (40%) maintained the components in the same room, 28% maintained them in different rooms on the same floor, and 32% maintained them on different floors or in different buildings. School system SOCs maintained their components in more limited space than all SOCs in general. Twelve of the 17 responding public school SOCs (70%) said their components were maintained in the same room. Two other school system SOCs (12%) said their components were in different rooms on the same floor, and three (18%) said their components were on different floors or in different buildings.

D. Use of ERIC Resources

Eric resources are used in a variety of ways to serve diverse purposes. Indexes are used to identify materials of selected topics or to find organizations which publish materials in particular subject areas. Microfiche are read, copied, and duplicated for files or out-of-library use. Computers are used to search the ERIC data bank to develop annotated bibliographies.

Several approaches have been used to characterize the use of ERIC resources. Usage may be indicated by the number of persons using the resources or the number of resource materials handled or copied by the users. Questions on the Workshop Guide asked workshop participants to characterize usage in terms of a typical week's activity at their respective locations. Those estimates for the typical weeks were then multiplied by 50 weeks (setting aside two weeks for holidays, etc.) to obtain estimates for a typical year. Annual estimates based on reported usage were then extrapolated to develop estimates for nonresponding SOCs. Extrapolations were simply the product of multiplying the average reported usage by the number of nonresponding SOCs of each type.

Original usage estimates for school system SOCs in the ERIC Management Workshop Final Report totaled approximately 200,000

persons. Because of the recounting of school system SOCs (which resulted in a larger number of microfiche collections being identified as school system SOCs), the estimated usage of ERIC resources at school system SOC locations should be even larger. The usage estimates below reflect the larger number of school system SOCs known to be in the United States.

Seven indicators of the usage of ERIC resources at school system SOCs are summarized in Table 6. The table presents both reported and extrapolated usage figures on an annual basis.

TABLE 6

INDICATORS OF ERIC USAGE ON AN ANNUAL BASIS
AT SCHOOL SYSTEM ERIC STANDING ORDER CUSTOMER (SOC) LOCATIONS

Type of Usage	Reported Usage From Participating SOCs		Estimated Use for Other SOCs		Total Estimated Usage
	No. SOCs	Usage	No. SOCs	Usage	
No. of Users of ERIC Microfiche Collection and Printed Tools	18	92,950	40	206,600	299,550
No. of Computer Searches of ERIC Data Base	17	8,850	41	21,300	30,150
No. of Manual Searches of ERIC Data Base	17	9,150	41	22,100	31,250
No. Microfiche Titles Used in Any Manner	13	142,750	45	494,100	636,850
No. of Microfiche Titles Circulated	18	39,200	40	87,100	126,300

-continued-

TABLE 6 (Concluded)

Type of Usage	Reported Usage From Participating SOCs		Estimated Use for Other SOCs		Total Estimated Usage
	No. SOCs	Usage	No. SOCs	Usage	
No. of Microfiche Duplicated in Microfiche Form	21	8,800	37	13,000	21,800
No. of Paper Copies from Micrifiche Frames	16	72,850	42	191,200	264,050

Eighteen school system SOC representatives were able to characterize the number and types of ERIC users at their locations and the probable reasons those persons used ERIC. The types of persons using ERIC resources are shown in Table 7. Not

TABLE 7

PERSONS USING ERIC MICROFICHE AND PRINTED TOOLS DURING TYPICAL YEAR AT SCHOOL SYSTEM ERIC STANDING ORDER CUSTOMER (SOC) LOCATIONS

Type of User	Total Persons (18 SOCs)		Average No. Persons		
			Mean	Median	Range
School Teachers	42,400	(45%)	2355.6	375.0	0-15,750
Administrators	15,850	(17%)	880.6	225.0	0-3,750
Government Staff	10,000	(11%)	555.6	294.1	0-10,000
Graduate Students	9,050	(10%)	502.8	108.3	0-2,500
College Faculty	5,800	(6%)	322.2	7.1	0-5,000
In-house Staff	3,400	(4%)	188.9	12.5	0-2,250
General Public	3,300	(4%)	183.3	15.9	0-1,000
Undergraduate Students	3,150	(3%)	175.0	20.0	0-1,000
All Users	92,950	(100%)	5163.9	1075.0	50-21,750

surprisingly, school teachers are the largest proportion of users (40%). The next largest groups of users are administrators (17%), government staff (11%) and graduate students (10%).

When asked what the users' primary reasons might be for using school system ERIC resources, the 17 school system SOC representatives identified "Prepare Theses and Dissertations" as the most frequent probable reason (for 25% of the users). "Write Course Papers" was estimated to be the primary reason for 20% of the users. It is obvious that the SOC representatives thought that much of the use of their ERIC resources had more to do with student roles than with curriculum development (ninth place, only 2% of the users). All reasons for using school system ERIC resources are summarized in Table 8.

TABLE 8

ESTIMATED PRIMARY CLIENTELE REASONS
FOR USING ERIC RESOURCES BY SCHOOL SYSTEM
ERIC STANDING ORDER CUSTOMERS (SOCs)

Type of Primary Reason	Rank Order	Estimated Proportion of Users Citing Reason
Prepare Theses and Dissertations	1	25%
Write Course Papers	2	20%
Review Literature	3	14%
Maintain Current Awareness	4	13%
Identify Techniques	5	9%
Solve Problems	6	8%
Prepare Proposals	7	6%
Collect Data	8	3%
Develop Curriculum	9	2%

Although school systems appeared to have fewer resources than some other types of SOCs, the school system SOC representatives reported an annual per school system volume of computer and manual searches approximately equal to the average for all SOCs. Each school system conducted a mean of about 500 of each type of search per year. Statistics for the types and volume of searches are shown in Table 9.

TABLE 9

COMPUTER AND MANUAL SEARCHES OF ERIC DATA BASE
BY SCHOOL SYSTEM ERIC STANDING ORDER CUSTOMERS (SOCs)

Type of Search and SOC	No. SOCs	Number of Searches			
		Mean	Median	Range	Total Annual Searches
Computer Searches					
School Systems	17	520.6	50.5	0-3,250	8,850
All SOCs	377	447.5	89.1	0-25,000	168,700
Manual Searches					
School System	17	538.2	137.5	0-4,500	9,150
All SOCs	377	553.2	89.8	0-15,000	208,550

Based on the estimates of 13 school system SOC representatives, the average school uses almost 11,000 microfiche titles in a typical year, the third greatest usage among the eight types of SOCs. This rate of usage is actually above

the average usage for all SOCs, but considerably below the highest users (information centers use 26,254 titles per year; state agencies use 23,286 titles per year). A comparison of microfiche usage between school systems and all SOCs is presented in Table 10.

TABLE 10

ANNUAL USE OF ERIC MICROFICHE TITLES
AT ERIC STANDING ORDER CUSTOMER (SOC) LOCATIONS

Type of SOC	No. SOCs	Number of Microfiche Titles			
		Mean	Median	Range	Total Annual Use
Public Schools	13	10,980.8	2,500.0	50-67,500	142,650
All SOCs	355	9,596.6	3,738.9	0-438,450	3,407,650

Three principal means by which microfiche use may be indicated are the numbers of microfiche circulated, duplicated (in microfiche form), and copied (onto paper). Table 11 presents the estimated use of microfiche for school systems and all SOCs on an annual basis. School systems seem to circulate and make paper copies of microfiche at almost the same rate as do all SOCs in general. School systems do appear to make fewer duplicate microfiche, however.

TABLE 11

SPECIFIC TYPES OF ANNUAL USE
OF ERIC MICROFICHE (MF) TITLES
AT ERIC STANDING ORDER CUSTOMER (SOC) LOCATIONS

Type of Use and SOC	No. SOCs	Number of Microfiche Titles			
		Mean	Median	Range	Total Annual Use
Circulation of Microfiche					
School Systems	18	2,177.8	175.0	0-12,500	39,200
All SOCs	376	2,133.7	15.0	0-347,700	806,000
Duplication of Microfiche					
School Systems	21	419.0	10.0	0-5,000	8,800
All SOCs	387	1,066.2	6.7	0-173,850	413,700
Reproduction of Paper Copies from Microfiche					
School Systems	16	4,553.1	2,050.0	250-15,000	72,850
All SOCs	323	5,780.1	2,010.0	0-175,000	1,857,750

E. Availability of Library Management Data

As part of their management processes, many SOCs collect data on the use of their facilities and material resources. The data may be derived, for example, from counts of persons using the materials or from counts of the number of materials being read, circulated, or copied. All SOC representatives at the workshops were asked whether their organization collected data for management purposes and, if so, what kinds of data were collected and whether they would be willing to share the data with ERIC if so requested.

Approximately half of the workshop participants said they did collect data, and 93% of them said they would be willing to share that information with ERIC. Some volunteered to conduct new data collections for ERIC if asked to do so. Of the 22 school system SOCs in attendance, 13 said they collected some type of data. Ten of those school systems answered the question about whether or not they would share their data, and all ten answered affirmatively.

The types of data collected by school system SOCs are presented in Table 12. The most frequent types of information collected are the number of paper copies from microfiche, the number of users assisted, and the types of users assisted.

TABLE 12

COLLECTION OF LIBRARY MANAGEMENT DATA BY
SCHOOL SYSTEM ERIC STANDING ORDER CUSTOMERS (SOCs)

Type of Data Collected	School System SOCs (n=13) Number	%n
Microfiche Related Services		
Microfiche Reproduced on Paper	11	85
Microfiche Refiled	7	54
Microfiche Reproduced as Microfiche	4	31
User Related Services		
Number of Users Assisted	10	77
Types of Users	9	69
Number of Users Attending Orientations	6	46
Data Base Search Services		
Number of Manual Searches Conducted	7	54
Number of Computer Searches Conducted	6	46

The library management data routinely collected and its availability to ERIC is identified in Appendix C of this report. The school systems are listed by their identification numbers (two letter state name abbreviation, then two digit state number, then two digit organization number) which matches the sequence of listings in the 1978 Directory of ERIC Microfiche Collections. Additionally, a list of all ERIC Standing Order Customers that

Collect library management data and the types of data that they collect is presented in Appendix R of the *ERIC Resource Management Workshops Final Report.*

F. Concerns of Workshop Participants

In addition to being educational events, the ERIC Management Workshops served as forums for the exchange of ideas. Encouraged to discuss all ERIC-related topics of interest, workshop participants were quite open about their concerns. Some concerns were about local conditions; others addressed problems, materials, or processes in the ERIC system.

Virtually all participants wrote comments on the two information gathering forms used in this project, the Workshop Guide and the Participant Evaluation of Workshop form. Their thousands of comments were characterized and excerpted in detail in the ERIC Management Workshops Final Report. Since the many comments were not analyzed according to the types of SOCs making them, it was not feasible to report only the school system comments and concerns here. However, so many of the concerns were about system-wide aspects of ERIC that the major themes probably apply as much to school system SOCs as to all SOCs in general.

The most frequent or apparent concerns of workshop participants are summarized below in three categories: (1) key questions for ERIC, (2) problems with ERIC and suggestions for ERIC, and (3) needs for additional SOC staff training. The

reader is referred to the final project report for in-depth discussions on these concerns. Readers especially interested in this area should also read the appendices in that report that present sample verbatim comments from workshop participants. The presentations of participant questions and ideas (Appendix S for comments, Appendix T for training needs) provide clear expressions of their viewpoints.

Questions

In response to Workshop Guide items, most workshop participants identified several key questions they particularly wanted answered during the workshops. Although most, if not all, questions were answered during the meetings, the questions still provide insight into SOC needs for information concerning ERIC.

The SOC representatives asked questions on many topics, but four areas surfaced repeatedly. Many workshop participants sought an update on ERIC, asking what new materials, tools, and services were available and what new events were happening. The ERIC update session also received the highest evaluation by participants. Information on computer and manual searching was sought very often. Participants wanted to learn better means of planning searches as well as advanced techniques for conducting searches. A large number of participants asked for help on user training and orientation. Both materials and methods were

especially valued. Similarly, many participants asked about means for the promotion of ERIC. They wanted advice on how to reach new audiences.

Problems and Suggestions

Workshop participants expressed concern over difficulties they had with ERIC-related materials and activities. Often, they would present suggestions. Because of the consistency of the comments, the problems indicated may be derived more from ERIC practices than local conditions.

As with the questions, many topics were addressed. Three quite common topics seemed pervasive. SOC representatives were very concerned about the printed indexes of ERIC. They observed difficulties with many aspects of the indexes (such as format, publication schedule, and quality of abstracts) and suggested the production of new types of indexes (such as five-year cumulative indexes). The ERIC Thesaurus was a source of frustration on the part of many SOCs. Participants expressed difficulty with the clarity and application of index terms, Thesaurus format, and needs for improved scope notes. Extensive difficulties were expressed concerning the quality and format of microfiche, principally the quality aspects. SOC representatives were often troubled by the poor image quality and difficult-to-read document numbers of the microfiche. They provided many suggestions about quality control and format design.

Needs for Further Training

Approximately half of the workshop participants identifying themselves as school system SOCs said that they or their staff needed additional training on ERIC. Most of the persons making that statement also identified particular areas of training needs. Of the 15 school system SOCs that answered the question on training, 11 (73%) said yes, additional training was needed. Nine of the 11 specified the following types of training needed:

1. Introduction to ERIC
2. Advanced information on ERIC
3. Update on the ERIC system
4. Use of ERIC tools
5. Data base searching and bibliography development

Appendix D in this report lists the types of training needs specified by the school system SOCs. For illustrations of the exact types of training requested by the SOCs, the reader should refer to Appendix T in the final project report. Many example comments by workshop participants are presented verbatim in that section.

PART III

APPENDICES

APPENDIX A
WORKSHOP GUIDE

WORKSHOP GUIDE

ERIC Workshop Workshop Location_____

Date_____

Your name and title: _____

Your organization: _____

Its address: _____

_____

Your office telephone number: ( ) _____Ext____

What are the two most important questions you would like to have answered during this workshop?

1. _____

_____

2. _____

_____

3. What type of organization do you represent? (Check one)

___ a. College or university library
___ b. Public library
___ c. Information center
___ d. Research & development center
___ e. School system
___ f. State agency
___ g. Federal agency
___ i. Other (please specify:)

_____

4. What kinds of ERIC-related services are provided? (Check all that apply)

___ a. Reference assistance
___ b. Search referral (If so, to whom do you normally refer?

_____

___ c. Actual manual searching
___ d. Actual computer searching
___ e. Circulation of microfiche
___ f. Duplication of microfiche
___ g. Production of paper copies from microfiche
___ h. Ordering of documents from EDRS
___ i. Provide instruction about ERIC
___ j. Copy machine services
___ k. Circulation of portable microfiche readers
___ l. Other services (please specify): _____

_____

OVERVIEW OF ERIC COMPONENTS AND MANAGEMENT OF PRINTED TOOLS SESSION

5. How many copies or subscriptions do you currently use of each of the following ERIC printed tools? (NOTE: If you have forgotten what these tools are, your workshop leader will show you a recent copy.)

a.	Monthly CIJE	____ Subscriptions
b.	Semiannual CIJE	____ Subscriptions
c.	ERIC Thesaurus	____ Copies
d.	Monthly RIE	____ Subscriptions
e.	Semiannual RIE Index	____ Subscriptions
f.	Cumulative Title Index	____ Copies
g.	Cumulative Institutional Source Index	____ Copies

6. How can the location of your ERIC components (e.g., RIE, CIJE, Thesaurus, MF collection, computer search facilities, etc.) be characterized? (Check one)

a. ___ Our ERIC components are all in the same room.
b. ___ Our ERIC components are on same floor but not in same room.
c. ___ Our ERIC components are located on several different floors
d. ___ Our ERIC components are located in several different buildings.
Explain, if necessary: _____

MANAGING THE MICROFICHE COLLECTION SESSION

7. How many microfiche readers do you have? (Do not include reader/printers.)

a. _____ portable readers b. _____ stationary readers

8. How many microfiche reader/printers do you have? (Do not include readers only.)

_____ reader/printers

9. Please estimate how much use is made of the ERIC microfiche collection in an average week:

a. ____ Pages of paper copies reproduced per week from microfiche.

b. ____ Number of microfiche reproduced per week in microfiche form.

c. ____ Number of microfiche titles circulated out of house per week.

d. ____ Total number of microfiche titles used in any manner (read, circulated, copied, etc.) per week.

MANAGEMENT OF COMPUTER AND MANUAL SEARCHING SESSION

10. How many searches of ERIC resources does your staff conduct in an average week?

a. _____ computer searches b. _____ manual searches

11. If your staff conducts computer searches, do they search data bases other than ERIC?

_____ Yes _____ No

If so, which two or three computer data bases (other than ERIC) are searched most frequently?

_____

_____

_____

TRAINING AND ORIENTATION OF USERS SESSION

12. How much use is made of your microfiche collection and reference tools in the average or typical week? Please estimate the typical number of users in each category:

	No. Users for Combined MF/CIJE/RIE
a. Graduate students	_____
b. College faculty	_____
c. Undergraduate students	_____
d. Elementary/secondary school teachers	_____
e. Administrators	_____
f. In-house staff	_____
g. General public	_____
h. Government staff	_____
i. others: _____	_____
Approximate Total per week	_____

13. Why are your clientele using ERIC materials? Please estimate the percentage of times each reason would be given as the primary reason by the users in (12):

a. Preparation of theses and dissertations	_____ %
b. Course papers	_____
c. Current awareness	_____
d. General literature review	_____
e. Preparation of proposals	_____
f. Identification of techniques applicable to specific program	_____
g. Problem solving	_____
h. Data collection	_____
i. Curriculum development	_____
j. Other: _____	_____
	100 %

14. How many users does your organization train or orient per year?

Means of Training or Orientation	Total Number of Participants Per Year
a. Presentations in library or information science classes	_____
b. General orientations to library services	_____
c. Presentations in classes other than library and information science	_____
d. One-to-one assistance on request	_____
e. Other: _____	_____

15. What instructional or orientation materials have you developed about ERIC resources: (Check all that apply)

a. _____ printed handouts
b. _____ audio/visual materials
c. _____ curriculum materials
d. _____ self-instructional units
e. _____ Other: _____

16. Do you believe that you or your staff need additional training so that you can assist users? _____ Yes _____ No
If so, please describe the additional training you desire.

_____

_____

_____

_____

LIBRARY MANAGEMENT REPORTING SESSION

17. What types of data do you collect for your library management purposes? (Check all that are appropriate)

a. ____ Number of microfiche refiled
b. ____ Number of microfiche reproduced in paper copy
c. ____ Number of microfiche reproduced in microfiche form
d. ____ Types of users (e.g., students vs. general public)
e. ____ Number of individuals assisted
f. ____ Number of individuals attending training and orientation sessions
g. ____ Number of computer searches
h. ____ Number of manual searches
i. ____ Other: _____
j. ____ Other: _____
k. ____ Other: _____

18. Would your institution be willing to share the above data with the ERIC system?

_____ Yes _____ No.

19. If you answered "yes" to number 18, please give name, address and telephone number of person whom we should contact.

_____
_____
_____
_____

SUGGESTION BOX
My one suggestion for an ERIC improvement is: _____
_____
_____
_____

APPENDIX B

ERIC MICROFICHE COLLECTIONS
HELD BY SCHOOL SYSTEMS IN THE UNITED STATES

(* Denotes participation in 1978-79 ERIC Management Workshops)

Types of school system organizations are coded as follows:
(S) School
(SD) School District
(IA) Intermediate Agency
(IC) Information Center

California (State No. 05)
08* Contra Costa County Department of Education (SD)
09* Los Angeles County Department of Education (SD)
24* San Mateo County Educational Resources Center (SMERC) (IC)
30* San Diego County Department of Education (SD)

Colorado (06)
10 Northern Colorado Educational Board of Cooperative Services (IA)

Connecticut (07)
03* Area Cooperative Educational Services (IA)
06 Capitol Region Education Council (IA)

District of Columbia (09)
03* District of Columbia Public Schools (SD)

Florida (10)
03* Broward County School Board (SD)
08 Duval County School Board (SD)
15* Marion County Schools (SD)
20* Florida Educators Information Service (IC)

Maryland (21)
01* Anne Arundel County Public Schools (SD)
13* Montgomery County Public Schools (SD)

Appendix B (Continued)

Massachusetts (22)
02* Network of Innovative Schools (IC)
23 Quincy Public Schools (SD)
26 Curriculum Evaluation Dissemination Information Services (IC)

Michigan (23)
07 Detroit Board of Education (SD)
15* Oakland Schools (SD)
17 Wayne County Intermediate School District (IA)

Missouri (26)
06 Kansas City Technical Education Center (S)
10* St. Louis Board of Education (SD)
14* Columbia Public School Facilitation Project (IC)

New Jersey (31)
01* Education Improvement Center, Northeast Information Storage and Retrieval Unit (IC)
06* Educational Improvement Center of Northwest New Jersey (IC)
11 Education Improvement Center South (IC)

New York (33)
03 Board of Cooperative Educational Services - Belmont (IA)
08* New York City Board of Education (SD)
14 Board of Cooperative Educational Services - Elmira (IA)
24* Board of Cooperative Educational Services, Erie No. 1 - Lancaster (IA)
26* Board of Cooperative Educational Services - Mexico (IA)
45 Board of Cooperative Educational Services - Plattsburgh (IA)
53* Syracuse City School District (SD)
57* Board of Cooperative Educational Services - Verona (IA)
58* Board of Cooperative Educational Services of Nassau County - Westbury (IA)
59* Board of Cooperative Educational Services - Yorktown Heights (IA)

North Carolina (34)
04 Charlotte Mecklenburg Schools (SD)
15* Winston-Salem/Forsythe County Schools (SD)

Pennsylvania (39)
17* School District of Philadelphia (SD)

South Carolina (41)
01 Charleston County Public Schools (SD)
05 Darlington County School District (SD)

Texas (44)
03* Project CITE Resource Center (IC)
11* Crystal City Independent School District (SD)
17* Education Service Center - Region XIX (IC)
28 Education Service Center - Region XVII (IC)

Texas (44) (continued)
30 Education Service Center - Region VIII (IC)
32 Ector County Independent School District (SD)
35 Education Service Center - Region X (IC)
51 Education Service Center - Region IX (IC)
53* Education Service Center - Region XIII (IC)

Virginia (47)
01* Alexandria City Schools (SD)
02* Arlington Public Schools (SD)
06* Fairfax County Public Schools (SD)

Washington (48)
01* Bellevue Public Schools (SD)
06 Educational Service District No. 123 (SD)
08 Seattle School District No. 1 (SD)
10 Educational Service District No. 110 (SD)

Wisconsin (50)
06* Madison Metropolitan School District (SD)

APPENDIX C

TYPES OF LIBRARY MANAGEMENT DATA COLLECTED
AND WILLINGNESS TO SHARE DATA
BY SCHOOL SYSTEM STANDING ORDER CUSTOMERS (SOCs)

SOC ID Number	Type of Library Management Data Collected											SOC Willingness To Share Data
	Number Micro-fiche Refiled	Paper Copies of Micro-fiche	Micro-fiche Dupli-cated	Types of ERIC Users	No. of Persons Helped	No. of Persons Trained	No. of Computer Searches	No. of Manual Searches	Other	Circ. of Micro-fiche Readers	Inter-Library Loans	
CA 508			MFREPRO	TYPEUSER	NUMHELP		COMPSRCH	MANLSRCH				NOTSHRE
CA 509				TYPEUSER	NUMHELP	NUMTRAIN	COMPSRCH					WILLSHRE
CA 524		MFCOPIED	MFREPRO		NUMHELP	NUMTRAIN	COMPSRCH	MANLSRCH				WILLSHRE
CA 530		MFCOPIED		TYPEUSER	NUMHELP	NUMTRAIN	COMPSRCH					WILLSHRE
CT 703				TYPEUSER	NUMHELP	NUMTRAIN	COMPSRCH	MANLSRCH				WILLSHRE
FL1003	MF FILED	MFCOPIED		TYPEUSER								
FL1015	MF FILED	MFCOPIED	MFREPRO	TYPEUSER	NUMHELP			MANLSRCH				
FL1020		MFCOPIED	MFREPRO	TYPEUSER		NUMTARIN	COMPSRCH					WILLSHRE
MA2202		MFCOPIED					COMPSRCH					WILLSHRE
MI2315	MF FILED	MFCOPIED	MFREPRO				COMPSRCH					WILLSHRE
NJ3101	MF FILED	MFCOPIED	MFREPRO	TYPEUSER	NUMHELP		COMPSRCH	MANLSRCH				WILLSHRE
NJ3106		MFCOPIED	MFREPRO		NUMHELP		COMPSRCH					WILLSHRE
NY3326		MFCOPIED		TYPEUSER			COMPSRCH	MANLSRCH				WILLSHRE
NY3353		MFCOPIED			NUMHELP			MANLSRCH				WILLSHRE
NY3357	MF FILED	MFCOPIED	MFREPRO	TYPEUSER	NUMHELP	NUMTRAIN						WILLSHRE
NY3358												WILLSHRE
NY3359				TYPEUSER	NUMHELP		COMPSRCH	MANLSRCH				
NC3415		MFCOPIED				NUMTRAIN						
PA3917	MF FILED	MFCOPIED			NUMHELP	NUMTRAIN						
TX4403	MF FILED	MFCOPIED	MFREPRO	TYPEUSER	NUMHELP	NUMTRAIN	COMPSRCH	MANLSRCH				WILLSHRE
TX4417					NUMHELP		COMPSRCH	MANLSRCH				WILLSHRE
TX4453					NUMHELP		COMPSRCH					WILLSHRE
VA4702	MF FILED	MFCOPIED		TYPEUSER	NUMHELP	NUMTRAIN		MANLSRCH	OTHER			WILLSHRE
WI5006					NUMHELP	NUMTRAIN	COMPSRCH					WILLSHRE

APPENDIX D

ERIC-RELATED STAFF TRAINING NEEDS IDENTIFIED
BY SCHOOL SYSTEM STANDING ORDER CUSTOMERS (SOCs)

SOC ID Number	Types of Staff Training Needs					
	Introduction to ERIC	Advanced Information on ERIC	Update On ERIC	Use of ERIC Tools	Data Base Searches	Other
CT 07 03						
FL 10 03		ADV INFO				
FL 10 20	ERIC INTRO	ADV INFO	UPDATE			
MA 22 02	ERIC INTRO		UPDATE			
MI 23 15					SEARCH	OTHER
NJ 31 06					SERACH	
NY 33 08				TOOLS		
NY 33 26	ERIC INTRO		UPDATE			
NY 33 53					SEARCH	
NY 33 57						
NY 33 58	ERIC INTRO					
TX 44 03			UPDATE			
TX 44 53					SEARCH	
WA 48 01		ADV INFO				
WI 50 06		ADV INFO	UPDATE			